



Workflow Designer

Task Updates

On this page you will see, which tasks are updated and could open Task Change logs.

2017-01-19

- [exist related record](#) - Version 8

This task allows to check for related Records. If your module is not listed within the Dropdown, it is using a non default way to match records, which is not supported.

Version	Date	Update
8	2017-01-19	Add Function to be source for "generate recordlist" task

2016-12-22

- [send Mail](#) - Version 34,
- [frontend confirmation box](#) - Version 1,
- [frontend actions](#) - Version 2

send eMail

- could send an email to one or multiple receivers with all default mail options
- Also you could add one or multiple attachments from different places.
 - Results from the following modules: [PDFMaker](#) and [SQLReports](#)
 - attach every Document related to the current record
 - attach a file from a url, you could generate also from field values
 - *in Documents module*: attach the current file

Store Mail to

From version 600.07 you could specify the record, a mail should be stored.

If you send a quote to a lead, you probably want to see inside the Lead Record, which Mails was send to the lead. This could be done with this field.

You could easily specify a crmid, to which this mail will be stored.

For example:

\$crmid Will store the mail in every module to the current one (Leave empty will have the same effect)

\$account_id Inside Quotes module, will store the mail to the ID from the **account_id** field. (The Organization of the Quote)

You must leave this field empty or set a correct ID of a record.

If you set a wrong value, the mail WILL NOT BE SEND.

If you are not sure, what to do, leave this field empty!

Integrate Access Tracker

Use this checkbox only, if you really work with the the values of accessed mails.

Sometimes a 1×1 counter image will be interpreted as spam category.

Statistics

The complete SMTP dialogue will be written in the statistic log, to give you the change to see, why a mail wasn't send

Templates

If you want to insert Mail Templates into the Mail Content, you only need to select the template on top of the content field.

The template feature is different then the template feature of Vtiger mail form.

It do not directly insert templates into the editor, but load the template and subject during execution.

This ensure to always use latest version of the the selected template and to be able to load templates from different modules.

The subject will be taken from Template, if there is no subject defined within task configuration.

Next to the default variables from the template module, you also could insert custom content into the template, which is defined with the send mail task.

The custom content is taken from editor of send mail task and will insert on position of a **\$mailto** variable you use within the template.

So you could use defined templates, but also individual content

2016-12-19

[send Mail](#) - Version 33

2016-12-06

- [CloudFile Upload File](#) - Version 9
- [CloudFile Download File](#) - Version 3
- [CloudFile rename File](#) - Version 3
- [call webservice](#) - Version 9
- [sendmail](#) - Version 32

CloudFile Upload File

Version	Date	Update
9	2016-12-06	Add an option to parse custom parent paths for ID based systems

CloudFile Download File

Version	Date	Update
3	2016-12-06	Add an option to parse custom parent paths for ID based systems

CloudFile rename File

Version	Date	Update
3	2016-12-06	Add an option to parse custom parent paths for ID based systems

Call Webservice

This task could do a background call to a configured URL and transfer multiple configured parameters.

You could set the Target URL, which could already contain some Parameters you want to transfer. If you want to send dynamic parameters it is easier to use the “add Parameter” button and add every single parameter to the call.

You could choose if you want to transfer the parameters with **GET** or **POST**.

GET means the Parameters will be send in the url like this: “https://?parameter1=value1&pareter2=value2&...”

POST means the Parameter won’t be send in the URL, but are also added to the request. This allows bigger amount of data, but must be supported by the webservice.

Since some versions you also could set special Headers you need to communicate with the Webservice. (For example authentication, Response Type, ...) (3)

With the setting 1 and 2 from screenshot you could process and store the result you get from the Request. If you parse the JSON, make sure it is valid.

Block settings

URL

Method

Response Format 1

save result in this \$env variable \$env[""] = Response 2

add Parameter

Param1 =>

Header Values 3

add Header

Param1 =>

Version	Date	Update
9	2016-12-06	Fix issue when using "call webservice" together with redirection function

2016-12-04

Updates related to new Workflow Designer version

New Tasks

- [show frontend message](#)
- [Frontend Action](#)
- [style inventory list](#)

Updates

- [Start](#) - Version 16
- [reverse Inventory](#) - Version 9
- [create Inventory](#) - Version 16
- [duplicate Record](#) - Version 8
- [show notification to user](#) - Version 10
- [set values](#) - Version 6
- [send email](#) - Version 31

show frontend message

Version	Date	Update
1	2016-12-04	Initial Release

Frontend Action

Version	Date	Update
2	2016-12-22	Update to improve features usable during configuration
1	2016-12-04	Initial Release

style inventory list

Version	Date	Update
1	2016-12-04	Initial Release

Start

This Task is the start point of all workflows and is allowed only once in a workflow.

Options

- **run time of this workflow**

(Should the workflow executed immediately or asynchronous (asynchronous creates a 1 second delay and execute the workflow with the next cronjob)

- **parallel execution**

If you use a [delay] or [set values] task, it could result in recursive execution, which could result in problems with the server

You should only activate parallel execution if you know you need multiple instances of one Workflow per record

- **only one execution per Record**

Only execute this workflow one time per record. Couldn't be reset and the workflow couldn't

executed manually, too!

- **do not store logs of execution**

Maybe you recognize a big vtiger_wf_log table. These are the analytics data from Workflow Designer. If you want to save space and don't need the statistics feature, you can disable logging for this workflow.

Triggers

[Are described on dedicated page](#)

Options

Execute this workflow if a record was referenced in another record

Have the same behavior like the "[request values from user](#)" task.

allow execution without a related record

If you activate this option, you could start a Workflow from ListView, without choosing a record. This will increase the usability if you create an export workflow or a workflow, which check some option.

Attention!

Please note, if you don't choose a related record, every used field value variables, which depend on the current record, will return an empty value!

execute process only once with all checked records in listview

Normally a workflow will be executed one time for every record you selected in ListView. If you enable this option the Workflow will only be executed with the first record you select and write all selected record IDs comma separated in the \$env Variable you configure.

Example

You select 3 records in listview and want to generate one email with data from all checked records.

You enable this option and configure the variablename to "recordids".

Now you could access the IDs in the variable `$env["recordids"]` in the format `id1,id2,id3`

Apply this condition in any situation to prevent execution

Per default a show/execute condition in start block, will only be used in DetailView or after Creation/Editing.

Then the condition will be checked and if the result is false, it won't be executed.

This means if you execute a workflow from ListView or by using the Workflow Planer, the condition will **NOT** be applied, because your configuration have a higher priority.

If you enable this checkbox, you could be sure the Workflow will only be executed in any situation if the condition is true.

Changelog

Version	Date	Update
17	2017-01-24	Add opportunity to force the check of the condition
16		Add compatibility with Frontend Workflows

Reverse Inventory

Version Update

9 Fix ID, which is stored in Environment variable

create Invoice/Quote/SO

The default behavior of this task is equal to the Create Record Task.

This task could be create Invoices, Quotes, ... with selected Products. You could specify all values of these modules, like item/group tax or discount.

All other settings are equal to the default record creator.

You could select all products you have created in your vtigerCRM system. Also you could generate the product_id with a custom function.

Version Update

16 Small Improvement to better support PHP Class extending

duplicate Record

Version Update

8 Fix Record ID, written to Environment variable

show notification to user

Version Update

10 Fix Assigned User Relations

Set Value

July 11, 2016 Updated on December 4, 2016

- could change values of records
- You could generate the values you want to set with 3 opportunities:
 - **static value** (Default)
The value will be generated by the default template textbox
 - **function**
You could create a custom expression, which returns the new field value. This function needs to be valid custom expression code. You could also use custom expressions in the static values box, but need to use `<?php return ; ?>` there.
 - **fieldvalue**
Load the new value of the field from another field from this or a related record

set References

If you want to create a Relation between two records, you need to set the ID of the other record.

Example

You want to create a Contact from Organization and want to set the "Organization" Field to the current Organization.

You only need to set the field "Organization name" to "\$id" (**not \$accountname**).

All available ID's are listed on top of the Drop Down List you get on the blue icon next to the text field. (ID of current Record)

This works for all linked fields and also fields inside Projects, Tickets, Events,.. where you could choose between different modules

Changelog

Version	Date	Update
6	2016-11-28	Small bugfix with related fields

